

**RMA Pilot Project  
Monthly Report  
May 2000**

1. May 3: Mimi Dionne, the Project Analyst, visited to meet the staff and see Lansing.
2. May 3: Two more people were interviewed for the second Project Analyst position.
3. May 10: OSS management staff took the Organizing Electronic Files class.
4. May 15: Mimi's first day of work. A project planning meeting was held with Jim, Mimi, Caryn and Doug.
5. May 16: One of the candidates for the second position visited to see the facilities and meet the staff.
6. May 18: An additional interview was held for the second Project Analyst position.

Accomplishments/Tasks Completed

- One Project Analyst was hired.

**RMA Pilot Project  
Monthly Report  
June 2000**

1. June 2: The contract with Provenance to purchase ForeMost Enterprise v. 2 was finalized.
2. June 9: Jim, Dave, Mimi and Caryn visited Allegan County to inspect their installation of ForeMost and discuss implementation issues.
3. June 12: The project team met with ITSD to discuss technical support of ForeMost.
4. June 14 and 15: Tora Bikson, our Business Process Analysis (BPA) consultant, visited to meet with the project team and outline the steps/activities of the BPA. We selected two BPs to focus our analysis on: the budget/rates development process, and a collaborative re-engineering process conducted by the Forms and Publications Team. Tora will also help us conduct the cultural change analysis (CCA).
5. June 21: The ERC held its quarterly meeting. We invited Allegan County to provide a demonstration of ForeMost that appears to have impressed everyone.
6. June 21: The project team conducted a file plan interview with the division director and the division secretary of the Records and Forms Management Division.
7. June 26: Deb Gouin started work as the second Project Analyst.
8. June 26: The project team attended the Forms and Publications Team meeting.
9. June 26: Project staff met with people from DMB's finance office to discuss the project budget, then we met to conduct a status report of project activities.

Accomplishments/Tasks Completed

- Contract with Provenance was finalized.
- First team meeting with BPA consultant was held.
- Progress report was given to the ERC.
- Second Project Analyst was hired.

**RMA Pilot Project  
Monthly Report  
July 2002**

1. July 1: The RMA Team discussed the need for improved management support for the use of ForeMost. The phase II users are reacting in a similar fashion to the phase I users because they do not believe there is a long-term commitment from management to use ForeMost as a mission-critical business tool.
2. July 9: Jim Kinsella met with the State Archivist to discuss potential business process improvements in the State Archives from the use of ForeMost. Past experience has shown that a process improvement has been the best incentive to get people to use ForeMost. Several parts of the reference process were discussed and some significant possible improvements were identified.
3. July 16: The RMA Team held a conference call with our new TrueArc customer service representative. We explained our concerns about our previous representative, our outstanding technical issues, and our plans for the pilot project before it officially ends and after. We sent the representative a list of our outstanding technical issues and suggestions for improvement and he promised to respond to them by July 26 (which he did as promised).
4. July 29: The RMA Team discussed how we intend to maintain the RMA software for our users after the pilot project officially ends. We decided to identify project participants who no longer intend to use the software, and remove it from their computers. We will offer to return their records, or allow their records to fulfill their retention requirements within the repository. We will continue providing maintenance, training and records management support to those people who continue using the software.

Tasks Completed

- 2 new users were trained?

**RMA Pilot Project  
Monthly Report  
August 2000**

1. August 2: Project staff set up a booth at the DMB Celebration Day. Demonstrations of ForeMost were available.
2. August 2: Caryn Wojcik participated in a conference call with several people from Provenance, including three vice presidents. They informed us that the release of Enterprise Version 2 would be delayed until August 30. They promised to provide weekly updates on the status of the software development. As a result of the delay, the project team began reorganizing the implementation calendar.
3. August 4: Mimi Dionne met with the State Archives' reference and processing staff to learn about their functions and procedures.
4. August 10: The project team met to update the status of various activities, including the marketing plan, the web page, project calendar, file plans, and training.
5. August 14: The project team met to further discuss the impact of the delay in the release of the software.
6. August 16: The project team made a presentation at the RMO quarterly meeting about the pilot project.
7. August 17: A draft file plan was presented to the Forms Management staff for their review.
8. August 18: Mimi Dionne and Deb Gouin delivered the file plan presentation to OSS, Administrative and Business Services staff.
9. August 23: Mimi Dionne and Deb Gouin visited Allegan County to learn more about their ForeMost installation.
10. August 28: The project team held a conference call with Tora Bikson to discuss a survey and interviews that will be conducted with pilot participants. We decided to assign each participant a number to assist with the confidentiality of data collection, and began discussing survey questions that should be used for baseline analysis.
11. August 30: Project team members worked on the file plan for the OSS, Administrative and Business Services staff.
12. August 31: Provenance called to inform us that "regression testing" of Version 2 had uncovered problems with the software, and that release would need to be delayed further. We expressed how seriously this additional delay would damage our pilot project. We scheduled additional conference calls with Provenance for next week to determine when release and installation of Version 2 can take place.

Accomplishments/Tasks Completed

- Demonstrations/presentations at the DMB Celebration Day and RMO quarterly meeting.

**RMA Pilot Project  
Monthly Report  
September 2000**

1. September 6: The project team met to discuss methodologies for file plan development.
2. September 6: Jim Kinsella had a conference call with the Chairman of Provenance to discuss software release delay problems.
3. September 7: Work continued on developing a file plan for OSS Business Services.
4. September 8: Jim Kinsella had a follow-up conference call with two vice-presidents of Provenance to discuss progress made in preparing to release ForeMost.
5. September 9: The file plan development presentation was given to the Forms and Publications Team.
6. September 11: Jim Kinsella, Doug Case, Debbie Gearhart and Caryn Wojcik discussed the role that RFMD staff could have in co-sponsoring the Mid-Michigan ARMA Chapter's Spring Seminar.
7. September 12: The RMA Project's web page was launched, and many positive comments have been received about it.
8. September 12: Work began on developing a file plan for Print and Graphics Services, Delivery/Materials Management Services, and the Consolidated Print Center.
9. September 13: Work continued on developing a file plan for Print and Graphics Services and the Consolidated Print Center.
10. September 15: The project team discussed which conferences we wanted to make presentations at, and more file plan development issues.
11. September 18: The project team met with our BPA consultant, Tora Bikson, to review the survey form and interview questions that would be used to collect baseline data for our analysis.
12. September 18: Work continued on developing a file plan for Mail and Delivery/Materials Management Services.
13. September 19: Work continued on developing a file plan and Retention and Disposal Schedule for Print and Graphics Services.
14. September 19: A progress report was given to the Electronic Records Committee.
15. September 19-20: Tora conducted interviews with 10 project participants.
16. September 21: Tora reviewed the results of her interviews with the project team. The project team also discussed revisions to the training and implementation schedule, additional strategies for gathering information from users and training participants.
17. September 25: Access database for helpline data.
18. September 25-28: Provenance staff worked with ITSD to uninstall and re-install ForeMost on the server. ITSD began testing ForeMost on the client.
19. September 27: Business Services reviewed their draft file plan and made comments for possible revisions.
20. September 27: Caryn Wojcik made a presentation to the Historical Center staff about the RMA Project.
21. September 28: Work began on developing a Retention and Disposal Schedule for Mail and Delivery/Materials Management Services.
22. September 28: Caryn Wojcik worked with Beth Cook on developing a database that we can use to analyze the information gathered from the first BPA survey.

23. September 28-29: The file plan development presentations were given to Mail and Delivery/Materials Management Services and the Consolidated Print Center.

#### Accomplishments/Tasks Completed

- The installation and training calendar was revised.
- Baseline data for the BPA was collected during 10 interviews, and a survey form that will be sent to all project participants was developed.
- Proposals were submitted to give presentations at the following conferences: MAC (Spring 2001), NAGARA joint presentation with Allegan County (Summer 2001), SAA joint presentation with the New York State Archives (Summer 2001), MAA (Summer 2001), Detroit ARMA (Winter 2001), ARMA Mid-Michigan (Winter 2001), ARMA joint presentation with Allegan County (Fall 2001), ARMA ISG (Spring 2001).
- An article about the pilot project was submitted to the SAA Electronic Records Section Newsletter.
- The pilot project web page was launched.
- ForeMost was installed on the DMB server.
- Project staff began using MS Project software to manage our activities and deadlines.
- File plan development work continued for OSS Administration/Business Services and the members of the Forms and Publications Team.
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**RMA Pilot Project  
Monthly Report  
October 2000**

1. October 2: Caryn worked with Beth Cook to develop a form and database that can be used to gather information from the first BPA survey.
2. October 4: Caryn and Mimi worked on the marketing plan. Doug, Mimi and Deb worked on the file plan for Administration and Business Services.
3. October 5: The first BPA survey was mailed out to all project participants.
4. October 11-13: Doug, Caryn, Mimi and Deb attended ForeMost Administrator and End User Training. We learned how to perform administrator functions: how to customize the software for our environment, how to enter file plans, how to add users, groups and ACLs. We also learned how to use the software from an end-user perspective. This training was hindered by the fact that the integrations with GroupWise and Microsoft were not working (and were not installed on the computer lab terminals), and we could not practice using them.
5. October 16: The project team met to discuss how we would analyze the impact the software has on collaborative work. Two Provenance staff attended part of the meeting to discuss the status of the project.
6. October 17-18: Doug, Caryn, Mimi and Deb attended ForeMost training. We learned techniques for training others to use the software. We also drafted an outline for the end user training that Mimi and Deb will conduct.
7. October 19: Mimi and Deb began practicing their delivery of end user training in the computer lab.
8. October 19-31: Caryn spoke with ITSD and Provenance many times to discuss problems that were encountered with the ForeMost macros that operate the integrations with our software.
9. October 23: Caryn, Mimi and Deb worked on developing training materials.
10. October 21-27: Doug attended the ARMA meeting.
11. October 24: ForeMost was installed on Deb and Mimi's computers. Caryn, Mimi and Deb began testing the functionality of the software and the integrations. We discovered that the Excel integration was not working at all, and there are problems with the other integrations (see #8 above). We continued developing training materials.
12. October 25: Caryn, Mimi and Deb tested the user accounts to confirm that users had all of the rights to perform necessary functions. Mimi and Deb continued practicing their delivery of end user training. We continued developing training materials. We sent the user manual out for printing. Additional problems with the software were discovered, such as an inability to file e-mail messages containing attachments, and a failure to auto-populate the subject field in the document profile screen.
13. October 26: The project team met with ITSD to conduct a status report about the software installation. We discussed the problems that have been encountered, and whether they have been resolved. Mimi and Deb continued practicing their delivery of end user training. We continued developing training materials.
14. October 27: Deb continued working with ITSD and Provenance to attempt to resolve the problems with the software. Deb practiced training a pilot user.
15. October 30: Mimi and Deb continued practicing their delivery of end user training. Jim, Caryn and Doug edited the training materials and outline. ForeMost was installed on Doug's computer. The project team held several conference calls with Provenance to try to resolve

the outstanding problems with the software. Provenance could not resolve the problems in time, and the end user training that was scheduled for October 31 and November 1 was cancelled. Provenance delivered new macros to fix some of the problems. Jim called the CEO of Provenance to discuss the problems we have had and their impact upon our project.

16. October 31: Mimi and Deb continued practicing their delivery of end user training in the computer lab. Jim sent a letter to the CEO of Provenance that outlined the problems we have had.

#### Accomplishments/Tasks Completed

- The BPA survey was distributed, and 60% of the participants responded to the survey.
- The project team completed ForeMost training.
- Retention and Disposal Schedules for OSS Administration and Business Services, and the Consolidated Print Center were completed.
- The file plans for the Records and Forms Management Division, OSS Administration and Business Services, the Consolidated Print Center and the State Archives were completed.
- All completed file plans were loaded into ForeMost.
- All pilot user accounts were created in ForeMost, though they will not be activated until each user attends training.
- Training materials to accompany the ForeMost User Manual (developed by Provenance) were developed.



**RMA Pilot Project  
Monthly Report  
November 2000**

1. November 1: Mimi and Deb practiced training two “students.” They were able to conduct the entire training in 1 hour.
2. November 2: Mimi attended a Forms and Publications meeting.
3. November 2-3: Data from the BPA surveys was entered into a MS Access database.  
November 7: The project team had a conference call with Provenance to discuss the functionality of ForeMost, and to get a status report on resolving the problems we are having with the software. Doug met with Materials Management to discuss retention schedule development.
4. November 14: Jim met with George Boersma, State CIO, to discuss e-mail retention issues. They discussed the possibility of using RMAs enterprise-wide to ensure that legal retention requirements are met and implemented.
5. November 15: Jim provided an update about the status of the project to the RMOs at their quarterly meeting.
6. November 17: Janet Phipps, Duane Berger and George Boersma officially filed the first documents into the ForeMost repository. They stated that they thought ForeMost was “fun” and “easy” to use.
7. November 17: Mimi and Deb practiced training.
8. November 20: Jim made a presentation at the CIO Impact meeting about e-mail retention issues. They discussed the possibility of using RMAs enterprise-wide to ensure that legal retention requirements are met and implemented.
9. November 20-28: Caryn drafted the first progress report for NHPRC and Jim submitted it.
10. November 20-23: Mimi worked on the marketing plan.
11. November 27: Jim, Doug, Caryn, Brice and Debbie met with representatives of the Michigan Gaming Control Board (MGCB). MGCB has purchased another RMA, iRims, and will be installing it in January 2001. We offered to assist the MGCB with their implementation, including the development of file plans, retention schedules and business rules. MGCB accepted our offer to work together on the project.
12. November 27-28: Mimi and Deb conducted two file plan presentations for the staff of Print and Graphics Services.
13. November 27: Provenance delivered a patch to fix the problems we have been experiencing with GroupWise.
14. November 28: Mimi wrote an article for the Society of American Archivists’ Outreach newsletter.
15. November 29: The project team met to discuss business rules for using ForeMost. We also discussed the marketing plan and training materials that will be used. Mimi and Deb practiced training.
16. November 30-December 1: The first group of users (30 students) attended the “Introduction to ForeMost” class.

Accomplishments/Tasks Completed

- The first documents were officially filed into ForeMost.
- The project team agreed to assist the MGCB with their implementation of iRims.

- The first progress report was submitted to NHPRC.
- ForeMost and all of the software activators are working.
- The first group of users attended introductory training.

**RMA Pilot Project  
Monthly Report  
December 2000**

1. November 30-December 1: The first group of users (28 students) attended the "Introduction to ForeMost" class. Evaluations that were completed by the students about the training were positive.
2. December 4-21: The project team began the MS Network workstation configuration of the first group of ForeMost users. During this initial configuration, problems were identified that required the project team to also change the TCP/IP Properties-WINS Configuration for each workstation to enable an additional resolution setting for the WINS Server Search Order. While the software itself appears to be working fine, many problems were encountered during deployment, such as: logon problems with the Microsoft NT network server, and software that had not been installed on some of the computers that were supposed to receive it. We have been working with ITSD to resolve these problems, however, some of them were not resolved before the end of the month. As a result, we have some frustrated users, IT staff and project staff. A meeting has been scheduled with ITSD for early January to evaluate this deployment and make improvements to the next one.
3. December 5: Jim and Caryn attended the meeting of the Enterprise Standards Review Team to discuss a statewide standard for RMA software that we drafted. The standard identifies that the functionality of a RMA product is needed by all state agencies, but it does not endorse a specific product. The ESRT endorsed our standard and presented it to the CIO Impact monthly meeting.
4. December 5: Mimi and Deb met with Mail and Delivery/Materials Management Services to review their file plan.
5. December 7: The project team attended a demonstration of iRims, the RMA product that has been purchased by the Michigan Gaming Control Board.
6. December 11: Provenance responded to the letter that Jim sent their CEO on October 31 that outlined our concerns.
7. December 13: Doug worked with State and Federal Surplus to develop their Retention and Disposal Schedules.
8. December 15: The project team met to evaluate the status of our project. We assigned responsibilities for various tasks to specific team members.
9. December 19: Jim and Caryn attended the quarterly Electronic Records Committee meeting and provided an update about the project.
10. Overall, participants are responding positively to ForeMost, and some business process improvements have already been identified.

Accomplishments/Tasks Completed

- 28 participants and observers attended introductory training.
- 18 participants are now using ForeMost.